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# Italy

**Post:** Rome

# Fresh Deciduous Fruit Annual 2015

**Report Categories:**

Fresh Deciduous Fruit

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**Report Highlights:**

With more than 2.3 MMT, Italy provides approximately 20 percent of the EU-28 apple production. Italy's MY 2015/16 apple production is forecast to decrease by 5.2 percent compared to the previous year. Italy is the largest EU-28 pear producer. Fruit size is forecast to be normal and quality excellent. Italy's MY 2015/16 pear production is forecast at 723,000 MT, 1.8 percent less than last season's supply. Italy is the leading table grape producer in the EU-28, followed by Spain and Greece. Italy's MY 2015/16 table grape production is forecast to increase, thanks to ideal weather during flowering and fruit set. Fruit quality is forecast to be very good.

**General Information:**
**I. APPLES**

**Table 1: Production, Supply, and Demand (MT)**

| Apples | 2013<br>Estimates 2013/2014<br>Post Data | 2014<br>Estimates 2014/2015<br>Post Data | 2015<br>Forecast 2015/2016<br>Post Data |
|---|---|---|---|
| Area Planted | 55,274 | 54,743 | 54,743 |
| Area Harvested | 53,006 | 52,000 | 50,000 |
| Commercial Production | 2,151,547 | 2,456,215 | 2,327,609 |
| Production | 2,151,547 | 2,456,215 | 2,327,609 |
| Intra EU-28 Imports | 34,274 | 33,944 | 33,900 |
| Extra EU-28 Imports | 8,042 | 6,897 | 6,840 |
| Total Imports | 42,316 | 40,841 | 40,740 |
| **Total Supply** | **2,193,863** | **2,497,056** | **2,368,349** |
| Fresh Domestic Consumption | 1,015,050 | 1,076,034 | 1,062,000 |
| Intra EU-28 Exports | 593,611 | 679,369 | 626,491 |
| Extra EU-28 Exports | 279,981 | 439,182 | 400,545 |
| Total Exports | 873,592 | 1,118,551 | 1,027,036 |
| For processing | 305,221 | 302,471 | 279,313 |
| **Total Distribution** | **2,193,863** | **2,497,056** | **2,368,349** |

Source: Istat; Assomela/CSO (Italy's Fresh Produce Service Centre); GTA

**PRODUCTION**

With more than 2.3 MMT, Italy provides approximately 20 percent of the EU-28 apple production. Trentino-South Tyrol covers 70 percent of the Italian apple production and 15 percent of the European one. Veneto, Friuli-Venezia Giulia, Piedmont, Emilia Romagna, Lombardia, and Campania are the main apple-producing areas. *Golden Delicious*, *Gala*, *Red Delicious*, *Fuji*, and *Granny Smith* represent the most widely planted varieties. Italy's MY 2015/16 apple production is forecast to decrease by 5.2 percent compared to the previous year. Alto Adige and Trentino are forecast to register production decreases of 4.5 and 3.6 percent respectively, compared to MY 2014/15. Remarkable decreases are forecast for *Golden Delicious* (- 4.8 percent), *Red Delicious* (- 7.7 percent), *Gala* (- 2 percent), *Braeburn* (- 10.2 percent), *Fuji* (- 5.2 percent), and *Cripps Pink* (- 17.1 percent). Fruit size is forecast to be normal and quality excellent.

**Table 2: Italian apple production by region (MT)**

| Region | 2013 | 2014 | 2015 | Var. % 2015/2014 |
|---|---|---|---|---|
| Alto Adige | 1,096,184 | 1,199,224 | 1,145,025 | -4.5 |
| Trentino | 460,537 | 559,608 | 539,522 | -3.6 |
| Other regions | 594,826 | 697,383 | 643,062 | -7.8 |

| Total | 2,151,547 | 2,456,215 | 2,327,609 | -5.2 |
|---|---|---|---|---|

Source: Assomela; CSO

**Table 3: Italian apple production by variety (MT)**

| Apple Production by Variety | Estimates 2013/2014 | Estimates 2014/2015 | Forecast 2015/2016 |
|---|---|---|---|
| Golden Delicious | 930,510 | 1,035,605 | 986,033 |
| Red Delicious | 229,951 | 268,084 | 247,462 |
| Imperatore | 58,088 | 74,431 | 70,717 |
| Stayman | 20,930 | 14,049 | 12,035 |
| Gala | 293,774 | 327,791 | 321,289 |
| Granny | 124,805 | 173,701 | 165,324 |
| Gloster | 128 | 69 | 46 |
| Elstar | 479 | 378 | 121 |
| Annurca | 35,000 | 40,000 | 35,000 |
| Renette | 28,716 | 33,953 | 30,371 |
| Jonagold | 14,369 | 9,475 | 9,206 |
| Jonathan | 5 | 27 | 4 |
| Braeburn | 84,718 | 90,735 | 81,521 |
| Idared | 2,814 | 1,118 | 1,157 |
| Fuji | 177,774 | 199,510 | 189,221 |
| Cripps Pink | 73,813 | 104,189 | 86,397 |
| Other | 75,673 | 83,100 | 91,705 |
| **Total** | **2,151,547** | **2,456,215** | **2,327,609** |

Source: Assomela; CSO

**CONSUMPTION**

According to the latest industry forecast, approximately 88 percent (2,048,296 MT) of the Italian crop will be suitable for domestic fresh consumption and export in MY 2015/16, while the remainder (279,313 MT) will be destined to the industry.

**TRADE**

In MY 2014/15, Italy imported 40,841 MT of apples, mainly from France (6,690 MT), Germany (5,959 MT), Czech Republic (4,611 MT), Slovakia (4,574 MT), and Chile (3,894 MT). Despite the Russian ban, Italy exported 1,118,551 MT of apples in MY 2014/15, a surge of 28 percent compared to the previous year thanks to increased volumes to Egypt (+132 percent), Saudi Arabia (+77 percent), Algeria (+76 percent), and Spain (+26 percent).

**II. PEARS**

**Table 4: Production, Supply, and Demand (MT)**

| Pears | 2013 | 2014 | 2015 |
|---|---|---|---|
| | Estimates | Estimates | Forecast |

| | 2013/2014 | 2014/2015 | 2015/2016 |
|---|---|---|---|
| | **Post Data** | **Post Data** | **Post Data** |
| Area Planted | 34,241 | 32,690 | 32,690 |
| Area Harvested | 31,526 | 30,145 | 30,000 |
| Commercial Production | 726,000 | 736,000 | 723,000 |
| Production | 726,000 | 736,000 | 723,000 |
| Intra EU-28 Imports | 45,157 | 46,808 | 49,000 |
| Extra EU-28 Imports | 57,145 | 51,836 | 52,000 |
| Total Imports | 102,302 | 98,644 | 101,000 |
| **Total Supply** | **828,302** | **834,644** | **824,000** |
| Fresh Domestic Consumption | 609,080 | 595,666 | 596,000 |
| Intra EU-28 Exports | 127,058 | 144,241 | 135,770 |
| Extra EU-28 Exports | 19,564 | 21,137 | 19,930 |
| Total Exports | 146,622 | 165,378 | 155,700 |
| For processing | 72,600 | 73,600 | 72,300 |
| **Total Distribution** | **828,302** | **834,644** | **824,000** |

Source: Istat; CSO; GTA

**PRODUCTION**

Italy is the largest EU-28 pear producer. Approximately 32,690 hectares of pear orchards are cultivated in Italy, mainly located in the Northeast. Emilia-Romagna (Ferrara, Modena, and Bologna) is the main producing area with almost 66 percent of Italy's total output. Pear planted area has been declining over the last decade due to lack of profitable investment opportunities. *Abate Fetel* is the dominant variety, followed by *William B.C., Conference, Kaiser, Coscia-Ercollini,* and *Doyenne du Comice.* Italy's MY 2015/16 pear production is forecast at 723,000 MT, 1.8 percent less than last season's supply. Production decreases are forecast for *Abate Fetel* (-7 percent than MY 2014/15*),* W*illiam BC* (-8 percent than MY 2014/15*),* and *Passacrassana* (-10 percent than MY 2014/15*).*

**CONSUMPTION**

Italy consumes most of its domestic production, exporting almost 21 percent.

**TRADE**

Italy's MY2014/15 pear imports reached 98,644 MT, mainly from Spain (27,007 MT), Argentina (25,049 MT), and Chile (16,715 MT). Despite the Russian ban, Italy exported 165,378 MT of pears in MY 2014/15, approximately 13 percent more than the previous year thanks to increased volumes to Romania (+82 percent), Croatia (+58 percent), Austria (+29 percent), France (+10 percent), and Germany (+4.6 percent).

**III. TABLE GRAPES**

**Table 5: Production, Supply, and Demand (MT)**

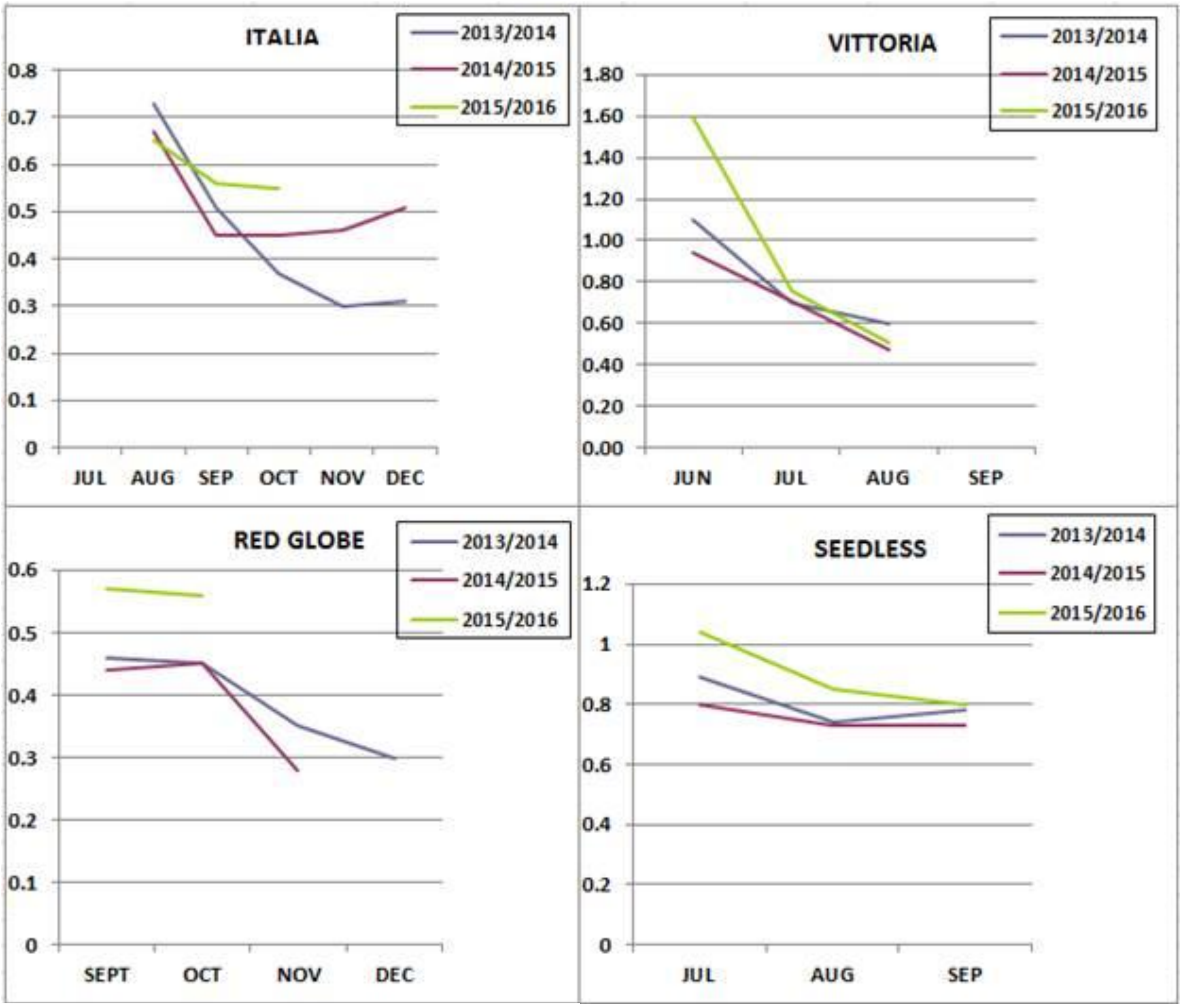
| Table grapes | 2013 | 2014 | 2015 |
|---|---|---|---|
| | **Estimates 2013/2014** | **Estimates 2014/2015** | **Forecast 2015/2016** |
| | **Post Data** | **Post Data** | **Post Data** |
| Area Planted | 49,609 | 46,638 | 46,600 |
| Area Harvested | 45,934 | 44,508 | 44,510 |
| Production | 1,108,326 | 998,627 | 1,000,000 |
| Intra EU-28 Imports | 11,294 | 14,227 | 13,650 |
| Extra EU-28 Imports | 9,195 | 7,689 | 7,350 |
| Total Imports | 20,489 | 21,916 | 21,000 |
| **Total Supply** | **1,128,815** | **1,020,543** | **1,021,000** |
| Fresh Domestic Consumption | 616,098 | 567,303 | 580,000 |
| Intra EU-28 Exports | 449,935 | 401,916 | 398,650 |
| Extra EU-28 Exports | 62,782 | 42,024 | 41,850 |
| Total Exports | 512,717 | 443,940 | 440,500 |
| Withdrawal from market | 0 | 9,300 | 500 |
| **Total Distribution** | **1,128,815** | **1,020,543** | **1,021,000** |

Source: ISTAT; Industry contacts; GTA

**PRODUCTION**

Italy is the leading table grape producer in the EU-28, followed by Spain and Greece. The Italian table grape production is concentrated in Southern Italy, mainly in Apulia and Sicily, which account for 70 and 25 percent of the domestic production, respectively. *Italia*, *Victoria*, and *Red Globe* are the main varieties, covering approximately 66 percent of the table grape area. In the last few years, Italy has gradually moved to seedless grapes cultivation, due to an increasing demand from intra and extra EU markets. *Sugraone* and *Crimson* are the most popular seedless varieties followed by *Thompson, Centennial,* and *Sublime*. However, table grapes planted area has been declining over the last four years due to lack of profitable investment opportunities. Italy's MY 2015/16 table grape production is forecast to increase, thanks to ideal weather during flowering and fruit set. Fruit quality is forecast to be very good. Early varieties (*Black Magic* and *Vittoria*) are sold from May to the end of July. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*) **—**mainly from Sicily, Abruzzo, Apulia, Basilicata, and Sardinia**—**the harvest occurs from August to December.

**Table 6: Average farm gate prices table grapes in Italy (Euro/kg)**




Source: ISMEA, Agricultural Marketing Center

**CONSUMPTION**

Italy is the leading table grape consumer in the EU-28, followed by Germany, the United Kingdom, Greece, France, Spain, Romania, Czech Republic, Portugal, Austria, Bulgaria, Slovakia, and Croatia (in decreasing order of consumption). Despite the fact that Italian seeded grapes are still greatly appreciated, experts claim that EU-28 consumers are increasingly demanding seedless varieties because of their quality and convenience. Thus, many EU-28 table grapes farmers are replacing old seeded varieties with new seedless ones (i.e. *Sugraone*, *Crimson*, *Thompson*, *Regal*, *Summer Royal*, *Centennial*, *Sublime*, etc.). Moreover, a greater focus is now being placed on late varieties (i.e. *Crystal* and *Princess*), in order to make the European grapes available after the busy summer fruit season.

**TRADE**

In MY 2014/15, Italy exported 443,940 MT of table grapes, mainly to Germany (102,932 MT), France (92,749 MT), and Poland (48,078 MT). Germany, Poland, and the Baltic States prefer the bigger Apulian grapes, while France favors the smaller Sicilian ones. Furthermore, new strategic markets are represented by North Africa, Middle East, and Northern Europe. As a consequence of the Russian ban, approximately 9,300 MT of Italian table grapes were withdrawn from the market and mainly donated to charity in MY 2014/15. However, seedless varieties (i.e. *Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, *Cotton Candy*) were not heavily affected by the Russian embargo as they are mainly sent to the United Kingdom, Scandinavian countries, and the United Arab Emirates. In MY 2014/15, Italy imported 21,916 MT of table grapes, mainly from the Netherlands (5,668 MT), Spain (5,032 MT), Egypt (3,137 MT), and Chile (2,113 MT).

**Abbreviations and definitions used in this report:**

EU European Union
MS EU-28 Member State
Ha hectare; 1 ha = 2.471 acres
MT Metric ton = 1000 kg
MMT Million metric tons

**MY Marketing year**
Apples: July/June
Pears: July/June
Table Grapes: June/May

**HS Codes:**
Apples: 080810
Pears: 080830
Table grapes: 080610